

A background network diagram consisting of numerous grey circles of varying sizes connected by thin grey lines, creating a complex web-like structure.

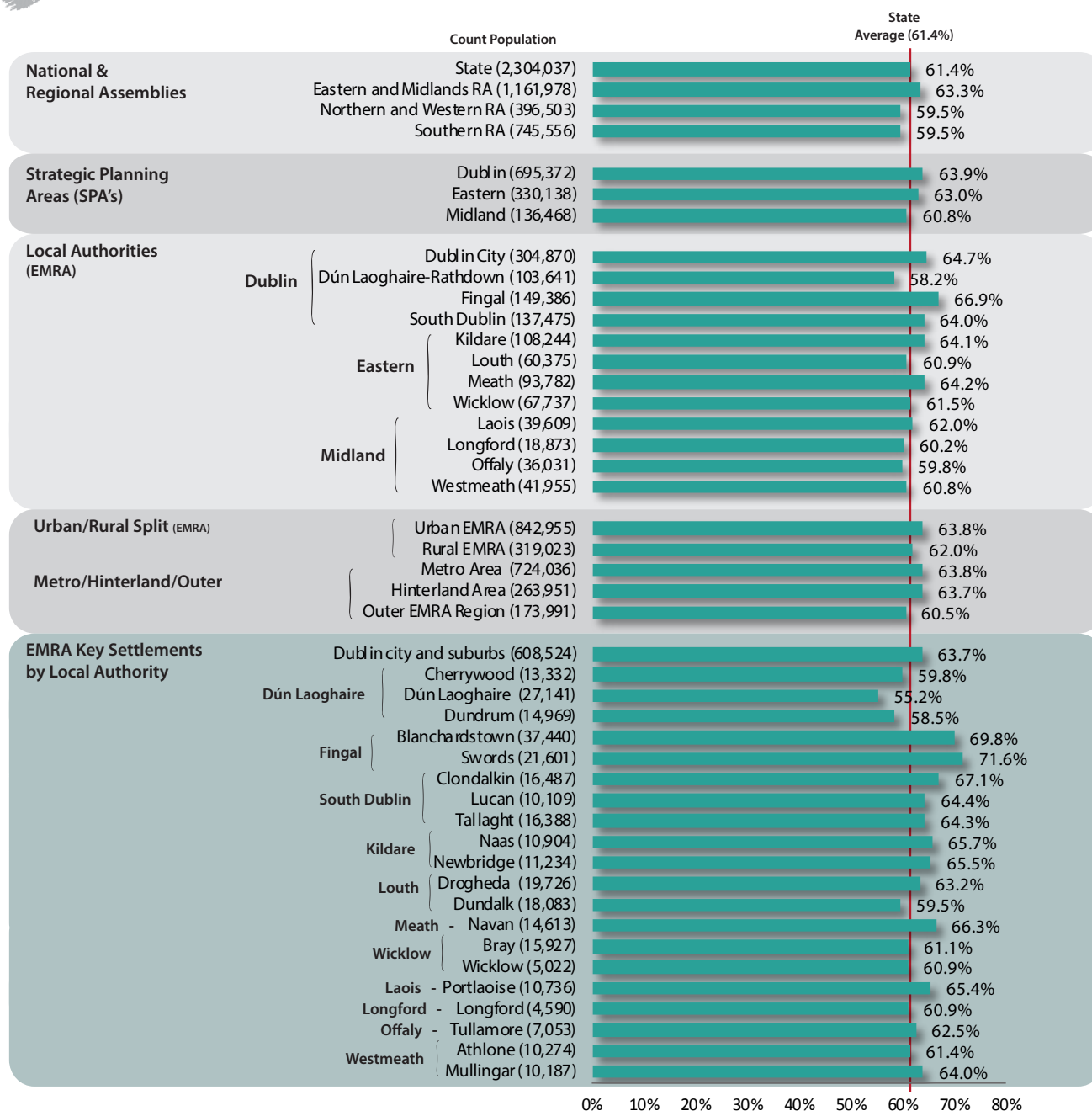
Economy and Employment

**Labour Force Participation Rates, Employment, Industry of
Employment, Location of Jobs, State Assisted Employment,
Business Demography, Unemployment, Live Register,
Disposable Income and Gross Value Added.**

Labour Force Participation Rate (PES), 2016



Labour Force Participation Rate, Census 2016

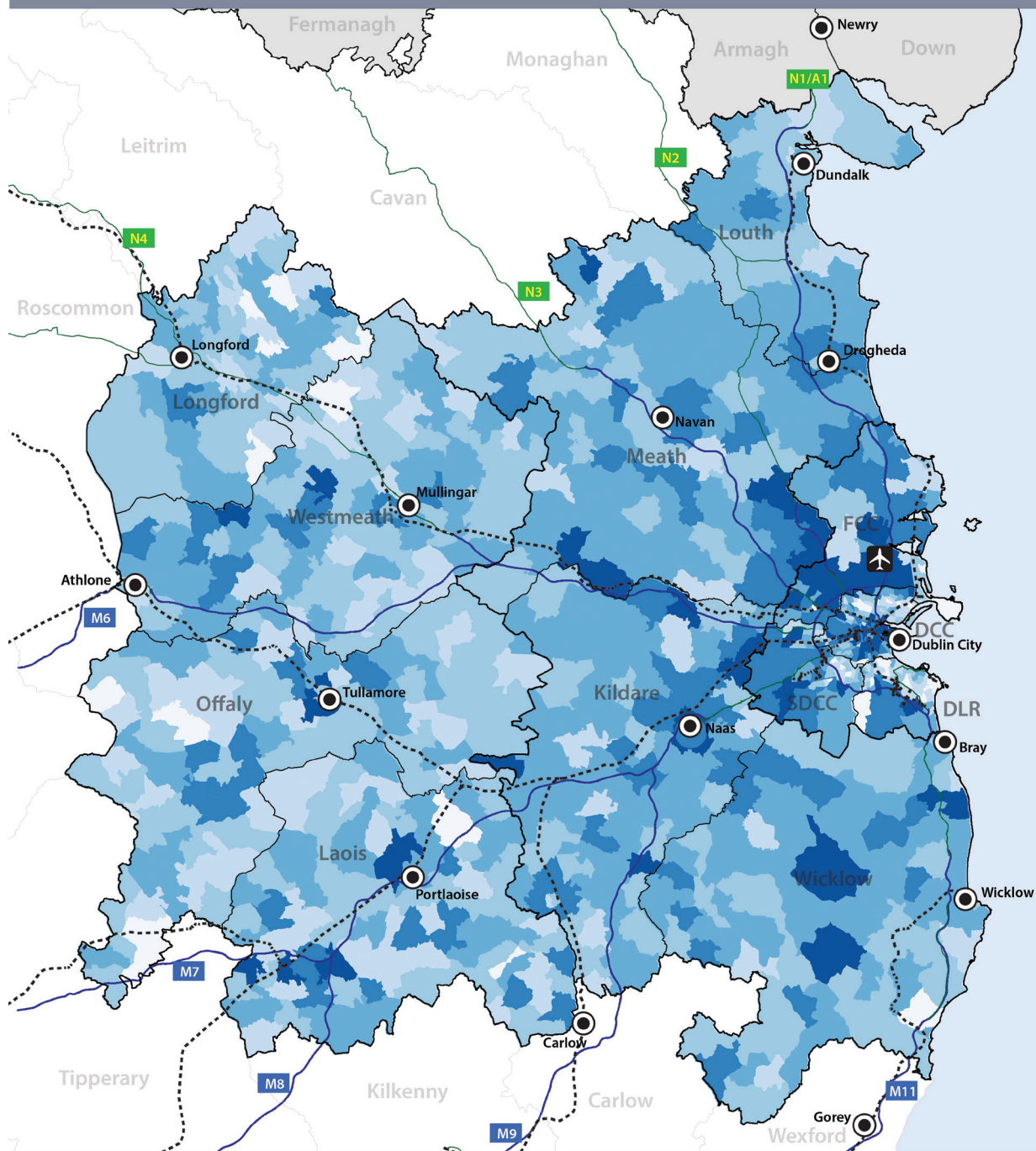


0% 10% 20% 30% 40% 50% 60% 70% 80%

- According to Census 2016, the total Labour Force in EMRA is 1,161,978 and equates to a Labour Force Participation Rate of 63.3% of the total Labour Force within the region - above the State average (61.4%). The Labour Force in EMRA is approximately 50.5% of the total Labour Force in the State (2,304,037).
- The Labour Force Participation Rate in EMRA (63.3%) is above both the SRA (59.5%) and NWRA (59.5%) averages. At the SPA level there are differences with the Dublin SPA with the highest proportion at 63.9% - higher than the Eastern SPA (63.0%) and the Midland SPA (60.8%).
- At the Local Authority level, highest rates are in Fingal (66.9%), Dublin City (64.7%), Kildare (64.1%) and South Dublin (64.0%). Lowest rates are in DLR (58.2%) and Offaly (59.8%). In total, three key settlements across EMRA have a Labour Force Participation Rate less than 60%: Dún Laoghaire (55.2%), Dundrum (58.5%) and Cherrywood (59.8%).

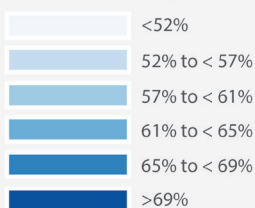
EMRA: Labour Force Participation Rate, 2016

By Electoral Division (ED)



Map Legend

Labour Force Participation Rate



- Strategic Planning Area (SPA)
- Local Authority
- Motorway
- Other Key Roads
- Light & Heavy Rail Network
- Key Settlements

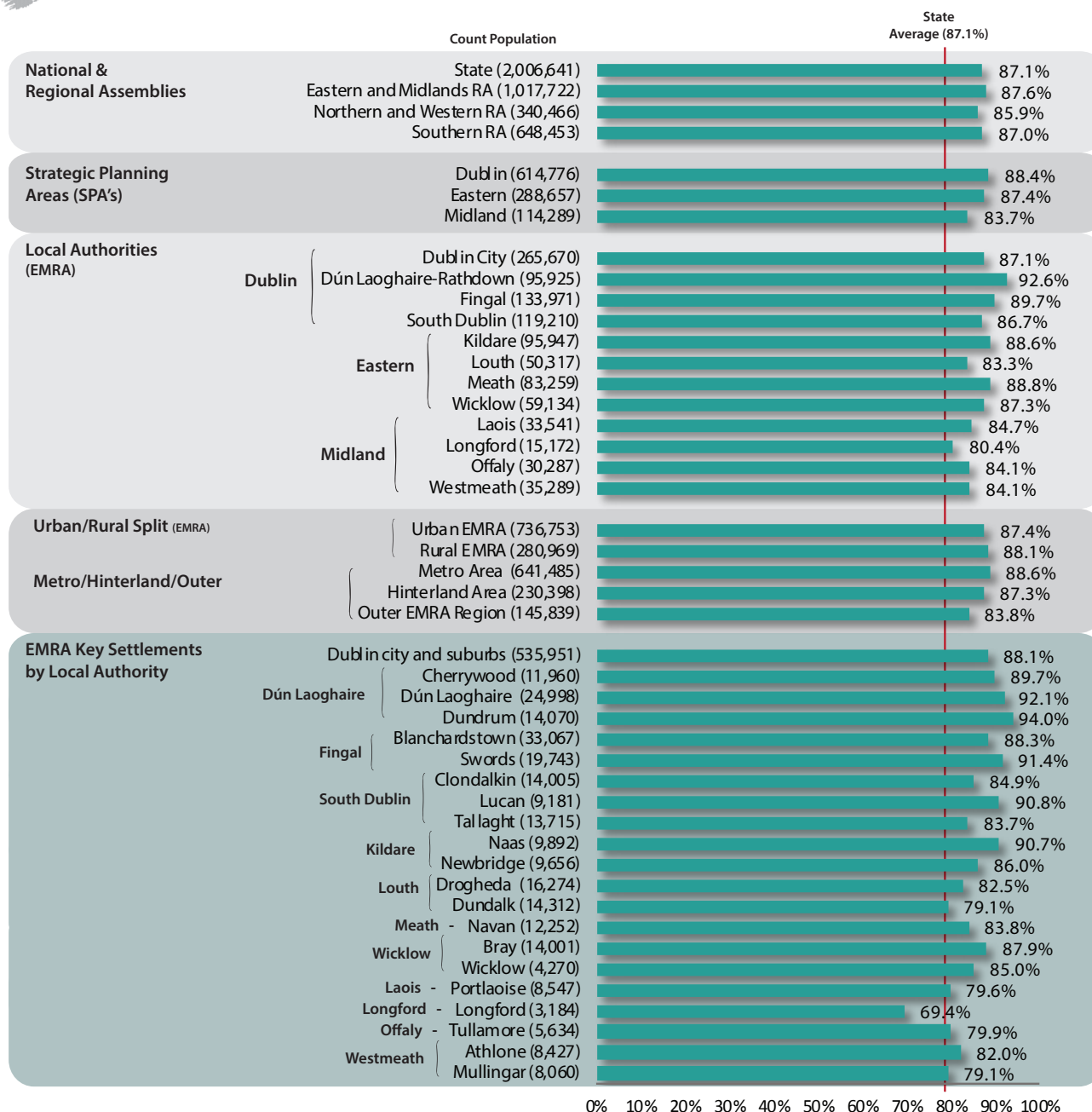
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Eastern and Midland Regional Assembly

Labour Force At Work Rate (PES), 2016



Labour Force At Work, Census 2016

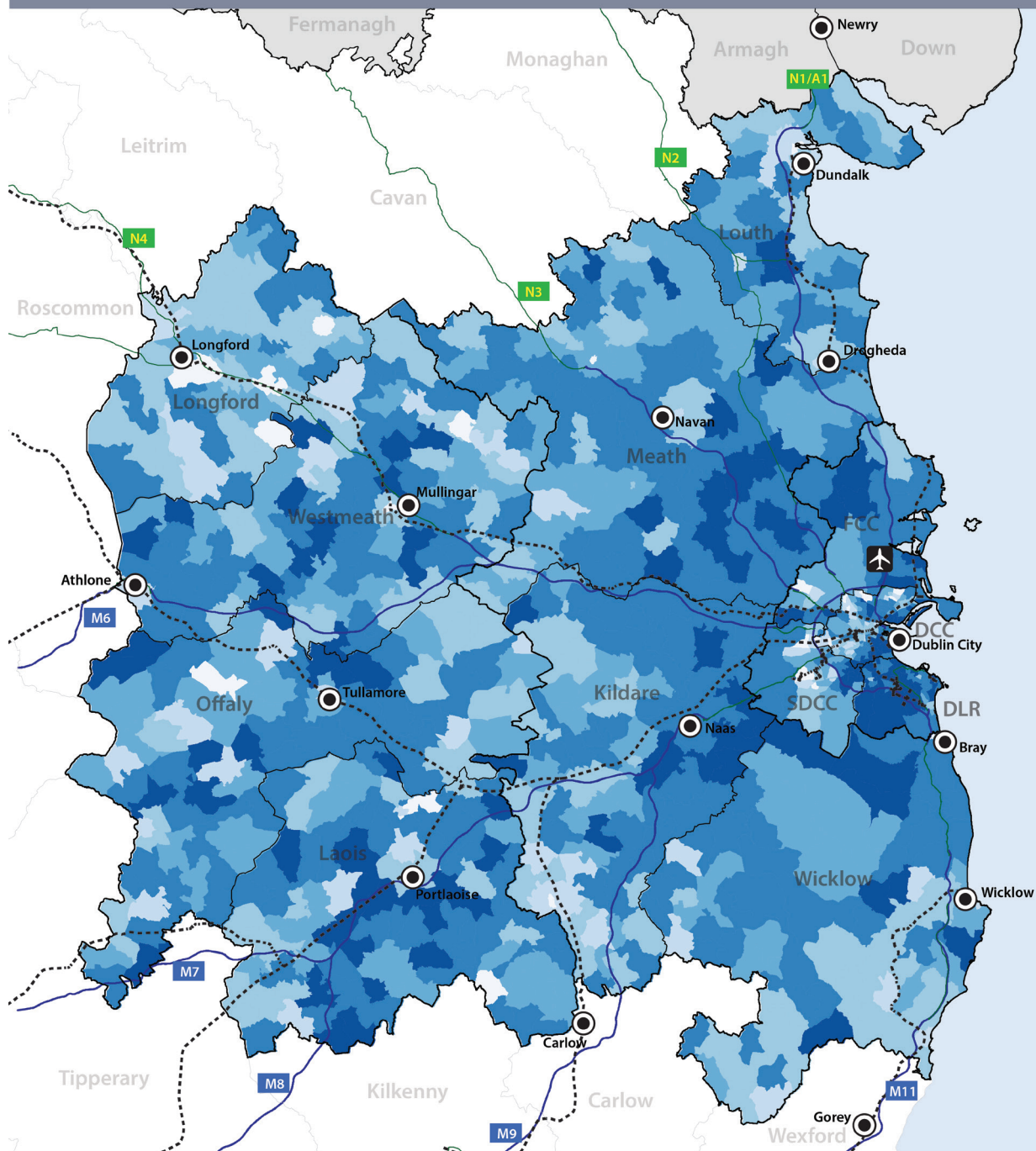


0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

- According to Census 2016, the total Labour Force At Work in EMRA is 1,017,722 and accounts for 87.6% of the total Labour Force within the region, marginally above the State average (87.1%). This total is approximately 51% of the total Labour Force At Work in the State (2,304,037).
- The Labour Force At Work in EMRA (87.6%) is marginally above both the SRA (87.0%) average and above NWRA (85.9%) average. At the SPA level there are differences with the Dublin SPA with the highest proportion at 88.4% - higher than the Eastern SPA (87.4%) and the Midland SPA (83.7%).
- At the Local Authority level, highest rates are in DLR (92.6%), Meath (88.8%), Kildare (88.6%) and Wicklow (87.3%). Lowest rates are in Longford (80.4%) and Louth (83.3%). In total, four key settlements across EMRA have a Labour Force At Work rate less than 80%: Longford (69.4%), Dundalk / Mullingar (79.1%) and Portlaoise (79.6%).

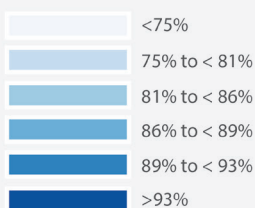
EMRA: Labour Force - At Work (%), 2016

By Electoral Division (ED)



Map Legend

Labour Force: At Work

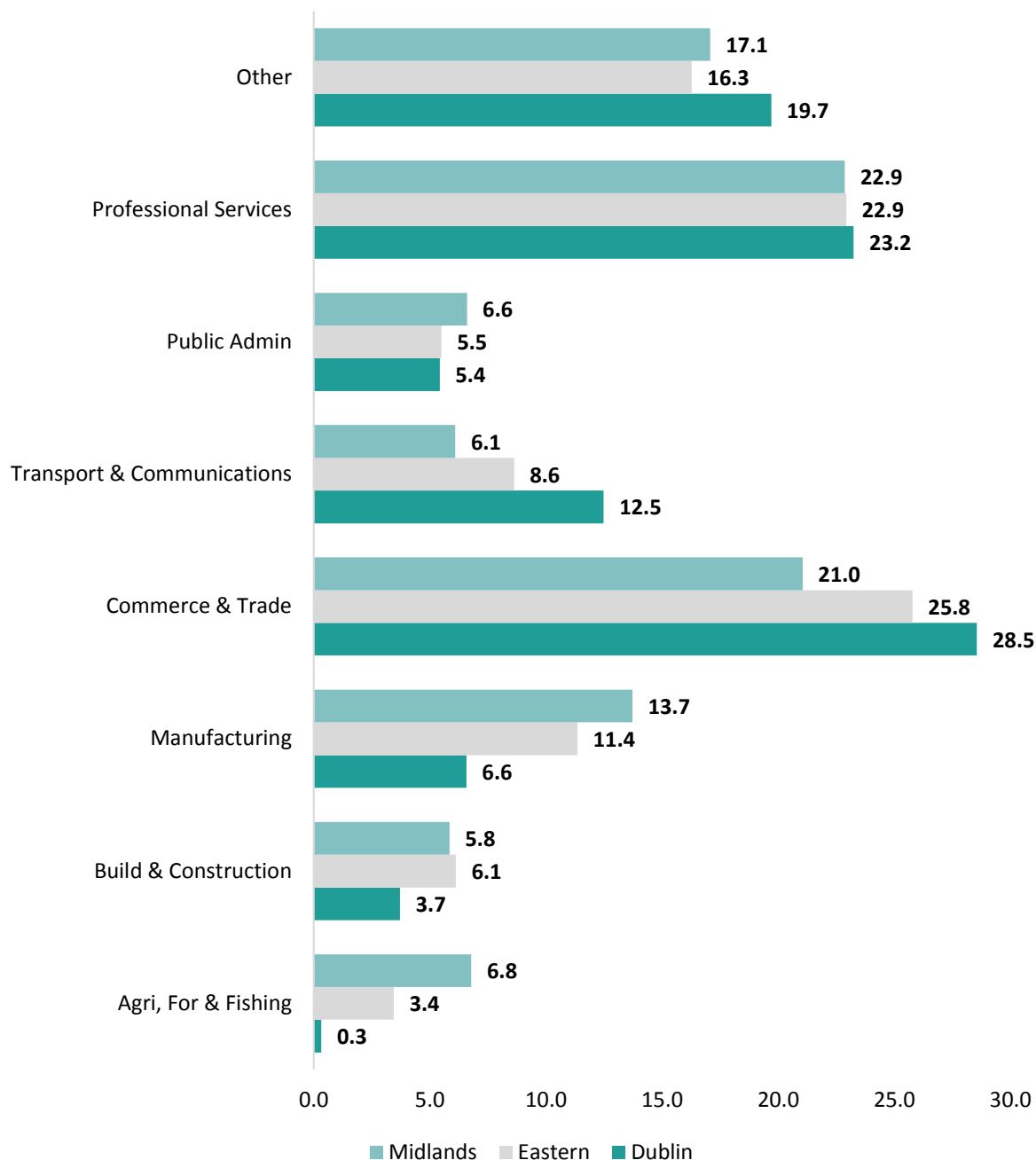


- Strategic Planning Area (SPA)
- Local Authority
- Motorway
- Other Key Roads
- Light & Heavy Rail Network
- Key Settlements

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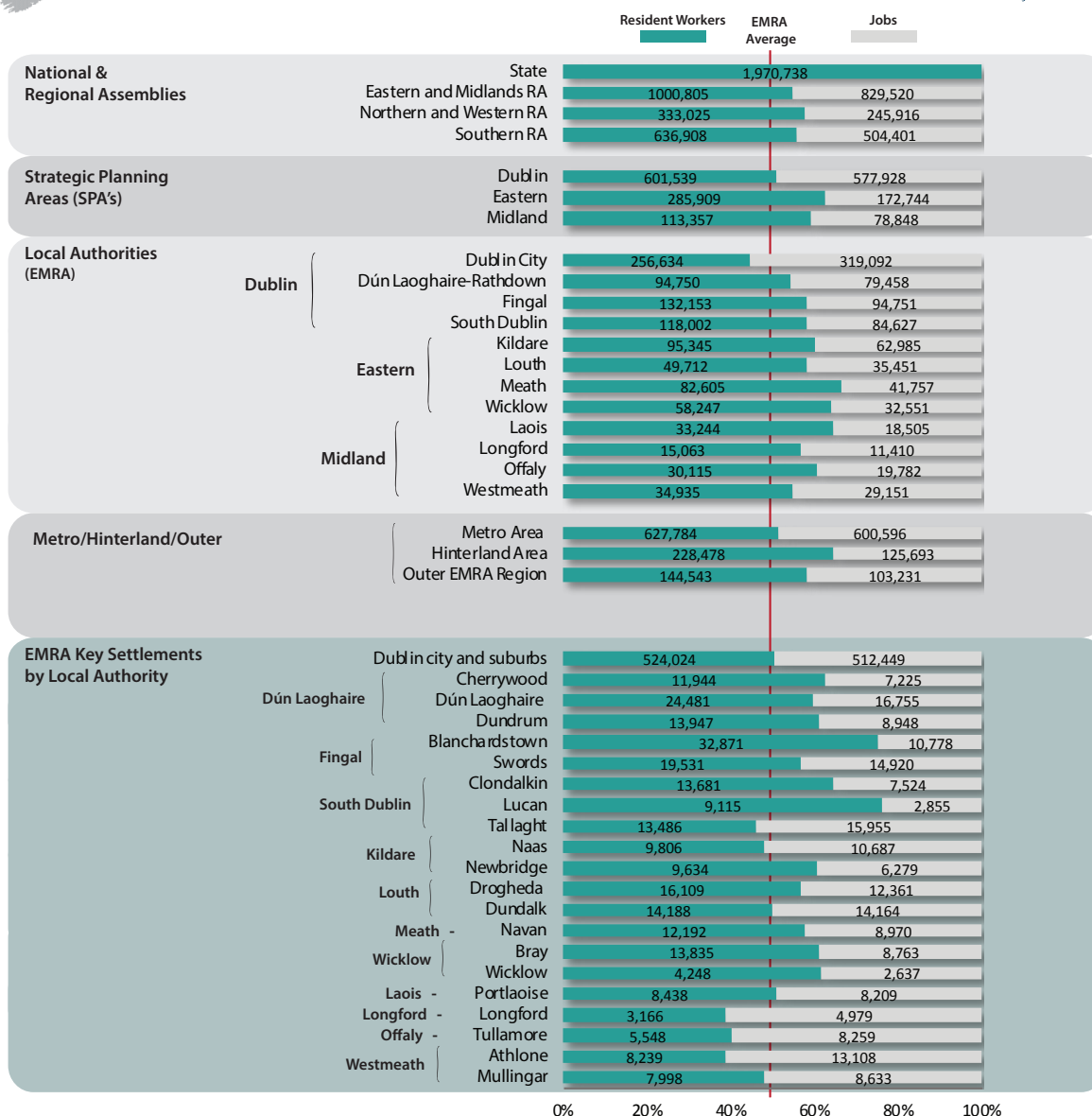
Industry of Employment - EMRA SPAs, 2016



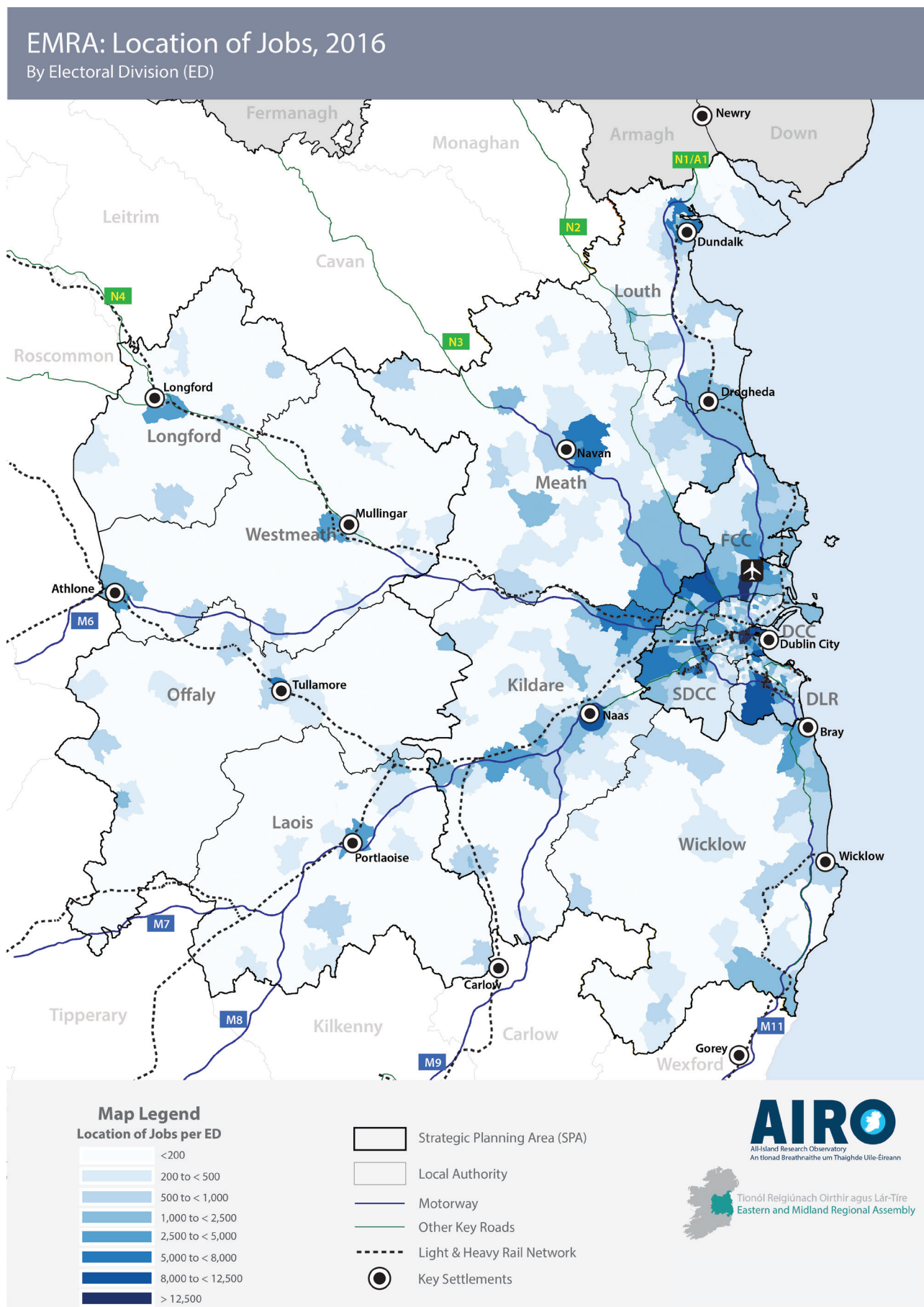
- The above graphic details the industry of employment that resident workers are employed in across the EMRA SPAs. Both 'Commerce and Trade' and 'Professional Services' are the most dominant industries across all areas but there are some significant differences in the importance of certain sectors within SPAs. It is important to note that this data relates to the industry of resident workers who may commute to others areas for employment and as such this is not a measure of jobs by industry in an area.
- The clear trends emerging in the graphic primarily relate to the importance of the 'Commerce and Trade' industry to the Dublin SPA relative to other areas. This sector accounts for 28.5% of all employment by Dublin resident workers and is considerably higher than both the Eastern (25.8%) and Midland SPA (21%). In contrast to this, the 'Manufacturing' industry is a larger employer for both the Eastern and Midland SPA than Dublin.
- The 'Agriculture, Forestry and Fishing' industry in the Midlands SPA employs 6.8% of all resident workers. This rate is much higher than both the Eastern (3.4%) and Dublin (0.3%) and as such highlights the importance of the agriculture economy to the this part of the EMRA area.



Resident Workers and Local Jobs, 2016

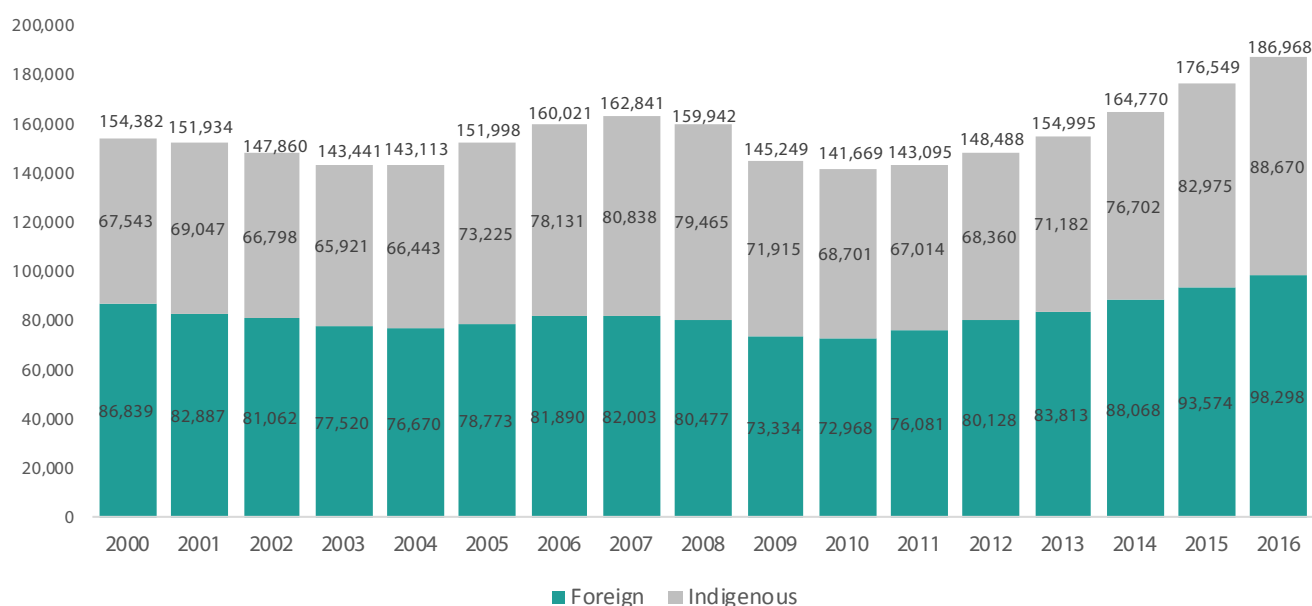


- By undertaking an analysis of the POWCAR 2016 database it is possible to develop a profile of both the number of resident workers and then importantly the actual number of local jobs (known location and excludes mobile workers and blank destinations) in all areas across the EMRA geographical hierarchy. The above graphic therefore details the importance of each area as an economic driver and key job location. The accompanying map details the number of jobs at the ED level across the EMRA area.
- According to POWCAR 2016 there were 1,000,805 resident workers in EMRA and a total of 829,520 jobs with destinations recorded as being in the region. The resident workers figure also includes a total of 19.2% or 192k workers who have a work destinations classed as either 'Blank' or 'Mobile'. At the SPA level Dublin accounts for 60% (577,928) of all known jobs in the region with 29% (172,744) in the Eastern SPA and 11% (78,848) in the Midland SPA. An analysis of the ratio between workers and jobs at the settlement level reveals the economic importance of a number of Midlands settlements such as Tullamore, Athlone, Longford and Mullingar for surrounding areas.
- The job location map details the number of jobs at ED level and highlights the main concentrations in the Dublin Metropolitan area - the M7/N7 corridor, the coastal corridors on the M11 and M1 and the key settlements across the region. Much of the area outside the immediate commuter belt and peripheral parts of local authorities have less than 200 jobs per ED.

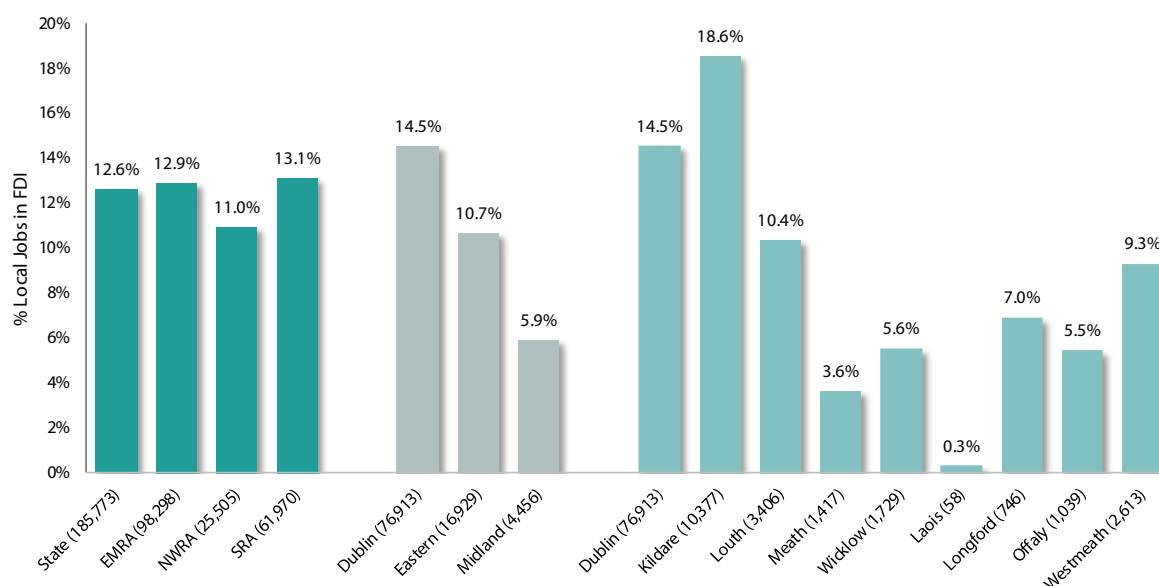


Location of Jobs within EMRA, 2016 (Source: CSO POWCAR & AIRO)

State Assisted Employment (Permanent & Full Time), 2016

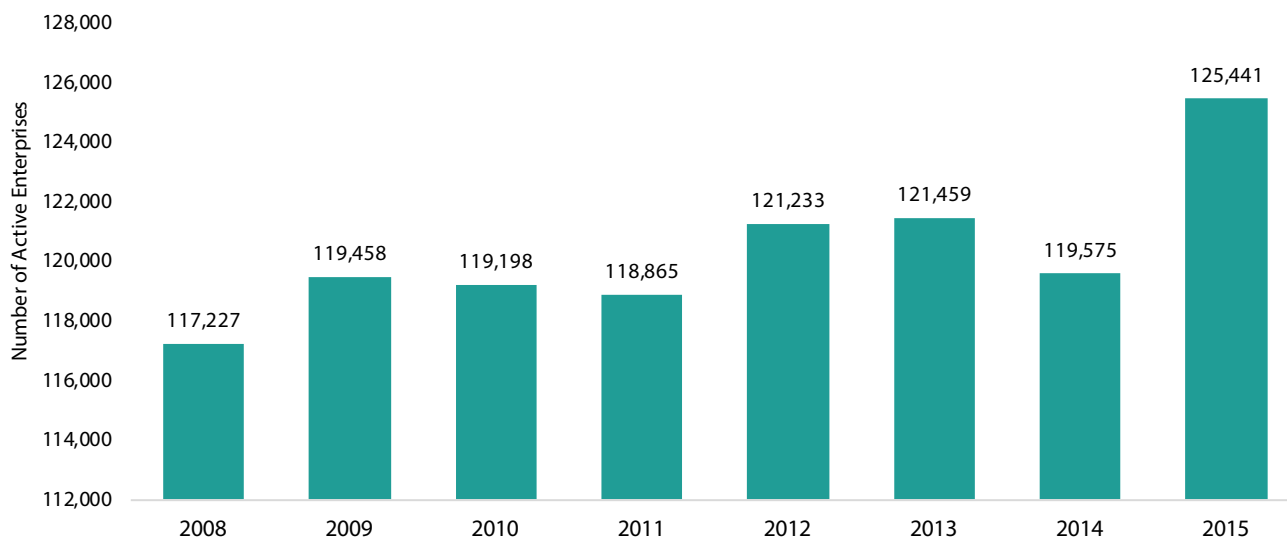


State Assisted Employment in EMRA, 2000 to 2016 (Source: DBEI & AIRO)

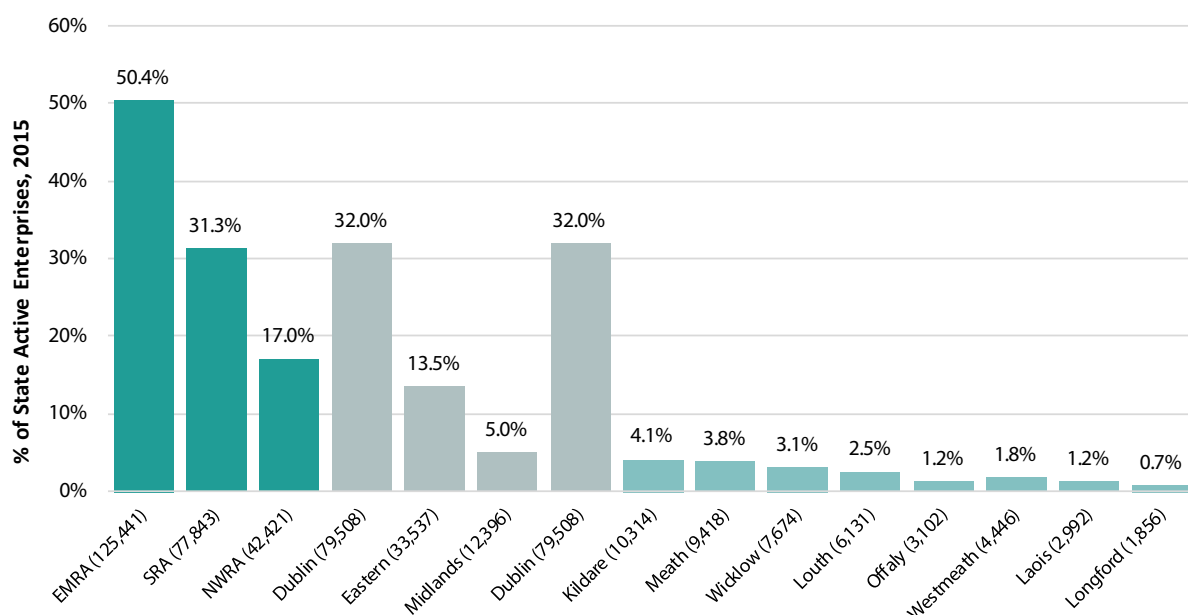


% FDI Employment in EMRA, 2016 (Source: DBEI & AIRO)

- The Annual Employment Survey provides an analysis of employment levels in Industrial (including Primary Production) and Services companies under the remit of IDA Ireland, Enterprise Ireland and Údarás na Gaeltachta. As of 2016 there were a total of 186,968 assisted employment jobs in EMRA. As a percentage of total employment, assisted jobs account for 22.5% of all jobs in EMRA (based on POWCAR Jobs 2016). State assisted jobs in EMRA are based on 52.6% FDI and 47.4% Indigenous employment. Across the EMRA SPAs the percentage of State Assisted Jobs that are FDI based are as follows: Dublin (57.6%), Eastern (43.3%) and Midland (30.9%).
- The bottom graphic provides an estimation on the number of known jobs in an area that are FDI based. This graphic is based on a combination of State Assisted data from DBEI and POWCAR 2016 results. Most striking here is the major difference between FDI Jobs rates across the EMRA SPAs with Dublin recording a rate of 14.5% whereas the Midland SPA only has a rate of 5.9%. At the local authority level, best performers are Kildare (18.6%), Dublin (14.5%) and Louth (10.4%). In sharp contrast to this are the very low FDI Jobs rates evident in both Meath (3.6%) and Laois (0.3%).



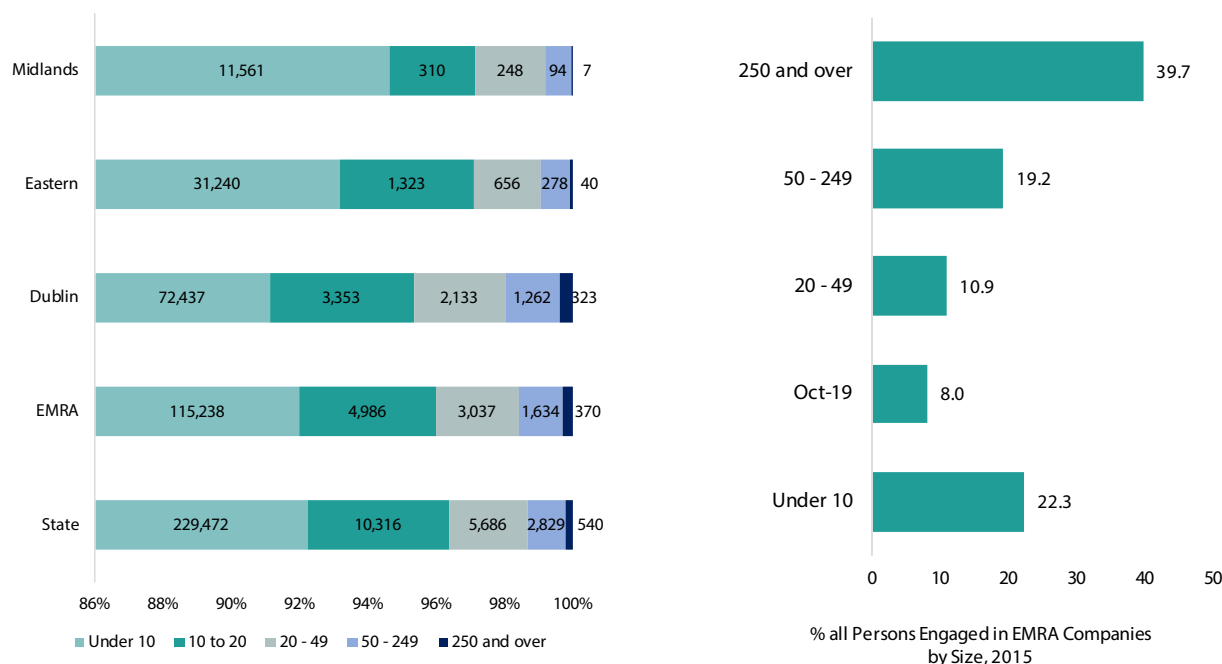
Active Enterprise in EMRA, 2008 to 2016 (Source: CSO & AIRO)



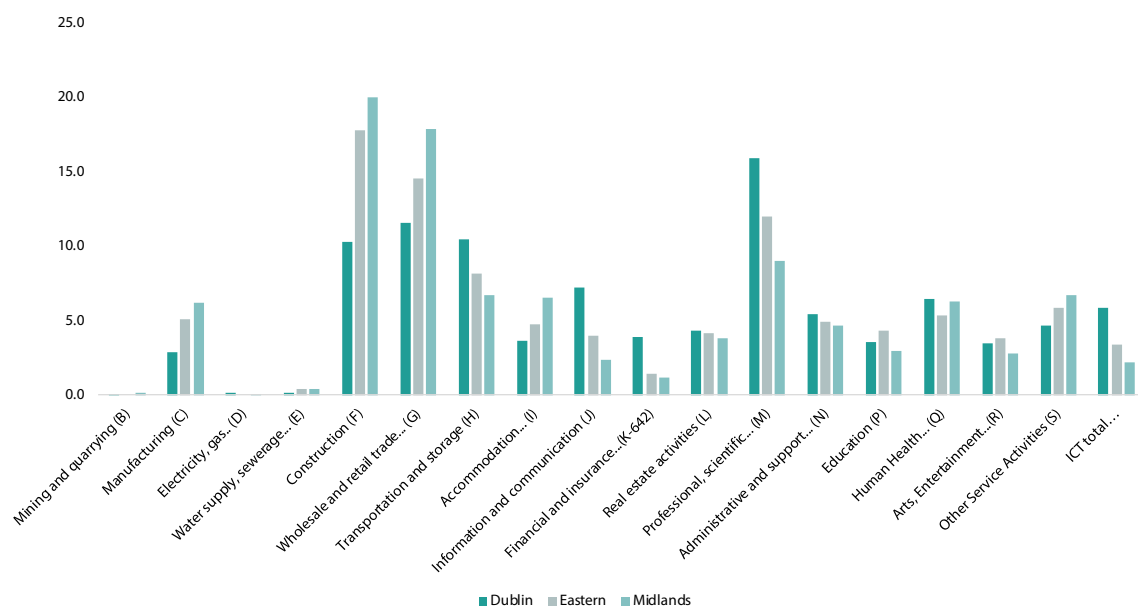
Active Enterprise in EMRA - SPA and Local Authorities, 2015 (Source: CSO & AIRO)

- Business Demography data is made available annually by the CSO and is based on enterprises with employees that are registered with the Revenue Commissioners and that have filed a corporate tax return during the reference year. It is important to note however that Business Demography data generally underestimates the number of enterprises within a county. The reason for this is related to the geography of tax registrations.
- In 2015 there were 125,441 active enterprises in EMRA. Overall, there has been a gradual increase in active enterprise with the total now 7% higher than the total in 2008 (117,227). Relative to the State total of 248,843, the EMRA area accounts for 50.4% of all active enterprises. As expected, Dublin is the most dominant location for active enterprises at both the SPA and local authority level with a total of 79,537 in 2015.

Business Demography - Active Enterprises by Size 2015



Active Enterprise in EMRA by Size, 2015 & Persons Engaged by Size of Company, 2015 (Source: CSO & AIRO)



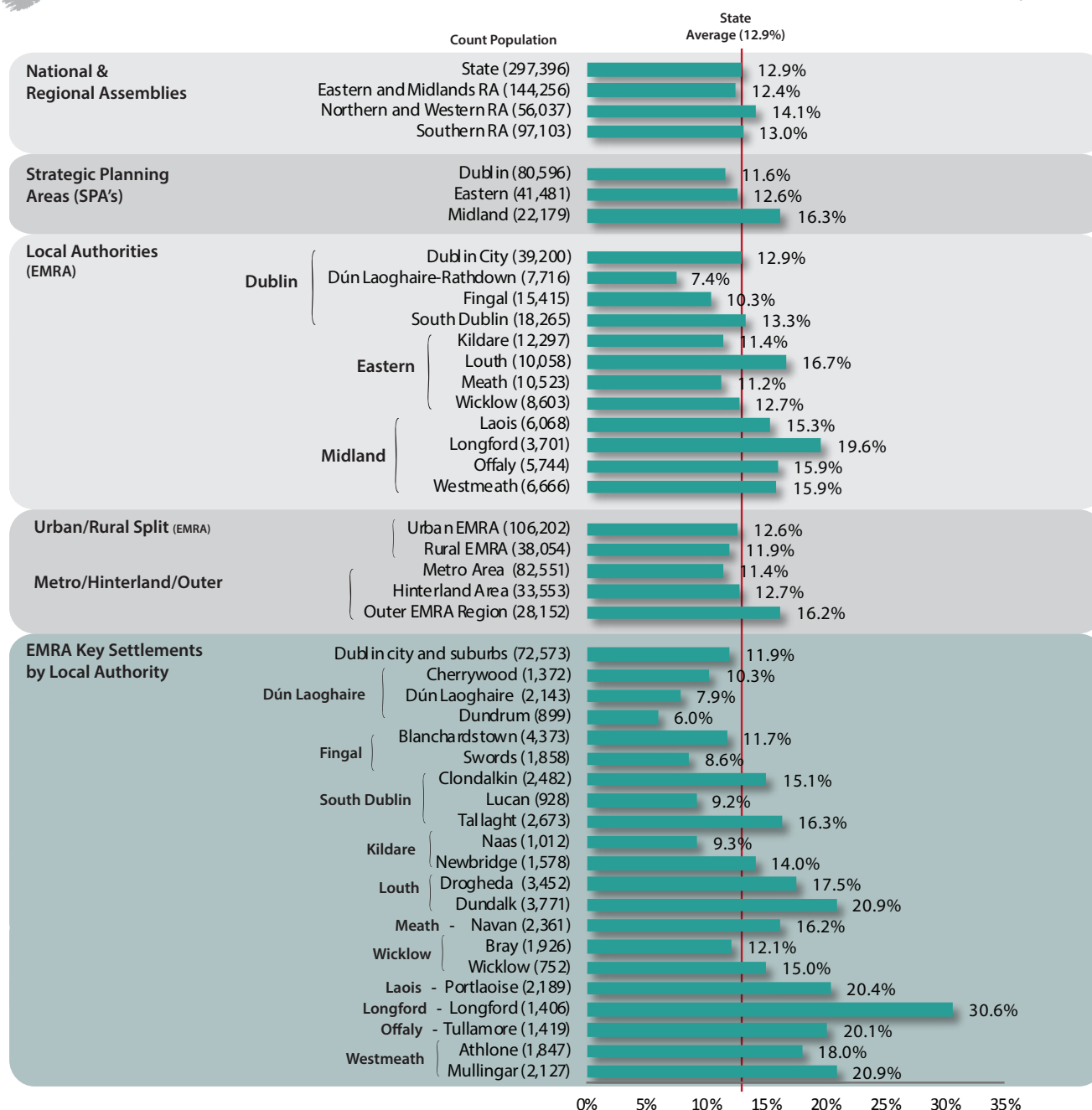
Active Enterprise in EMRA by Sector, 2016 (Source: CSO & AIRO)

- The distribution of the size of an area's enterprise base is an important indicator and provides details on the dependence on either large enterprises (50 to 250 or 250+ employees) or smaller enterprises (<10, 10 to 19, 20 to 49 employees). Business Demography data from the CSO is broken into five size categories: less than 10 employees; 10 to 19; 20 to 49; 50 to 250; and Over 250. The top left graphic details the distribution of active enterprises by size across the EMRA SPAs - most notable here is the higher proportion of smaller enterprises in both the Eastern and Midland SPA relative to Dublin. The top right graphic details the number of persons engaged by company size within EMRA.
- Business Demography data is classified using the NACE Rev 2 European method of industrial classification. The bottom graphic details the industrial classification of all active enterprises across the EMRA area and SPAs. The three most dominant sectors are 'Construction', 'Wholesale and Retail Trade' and 'Professional and Scientific'. Again, there are clear differences between the dominant sectors in Dublin and then the Eastern and Midland SPAs. In general, 'Construction' and 'Wholesale and Retail Trade' are more dominant in Eastern and Midland SPA whereas 'Professional and Scientific' enterprises are more dominant in the Dublin SPA.

Labour Force Unemployment Rate (PES), 2016

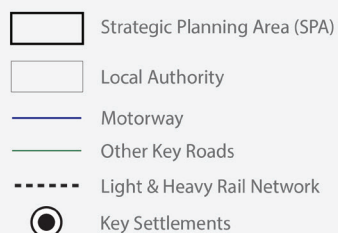
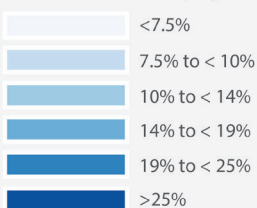


Labour Force Unemployment, Census 2016

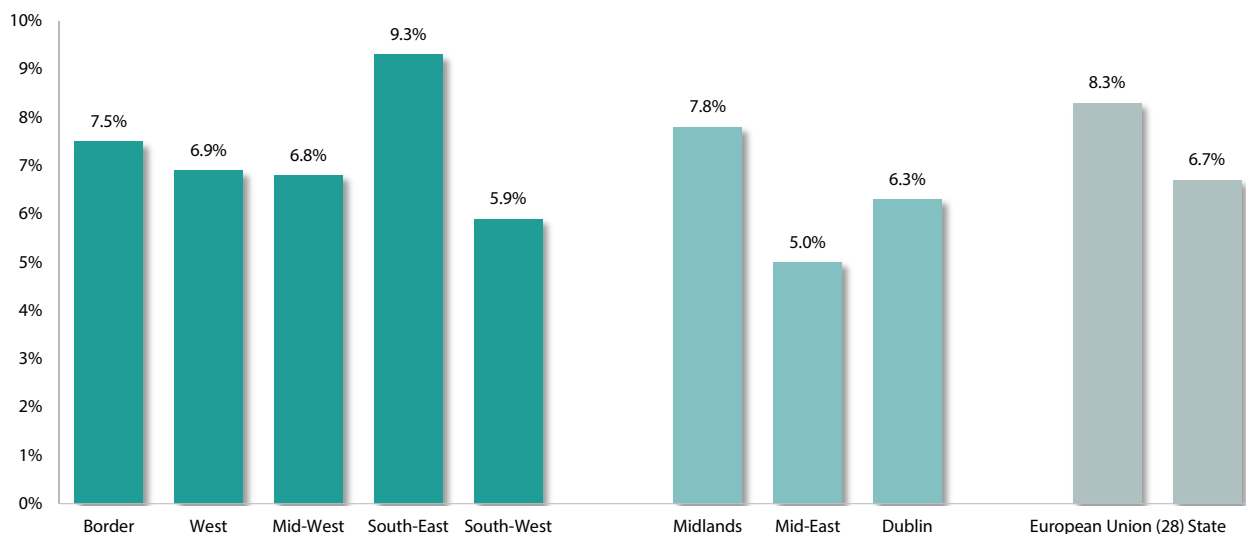


- According to Census 2016, the total Labour Force Unemployment Rate in EMRA is 144,256 and accounts for 12.4% of the total Labour Force within the region, marginally below the State average (12.9%). This total is approximately 48.5% of the total Unemployed Labour Force in the State (297,396).
- The Labour Force Unemployment Rate in EMRA (12.4%) is below both the NWRA (14.1%) average and the SRA (13.0%) average. At the SPA level there are clear differences with the Midland SPA with the highest rate at 16.3% - higher than the Eastern SPA (12.6%) and the Dublin SPA (11.6%).
- At the Local Authority level, highest rates are in Longford (19.6%), Louth (16.7%) and Offaly/Westmeath (15.9%). Lowest rates are in DLR (7.4%) and Fingal (10.3%). In total, five key settlements across EMRA have more than a fifth of their labour force recorded as unemployed: Longford (30.6%), Dundalk (20.9%), Portlaoise (20.4%), Mullingar (20.9%) and Tullamore (20.1%).

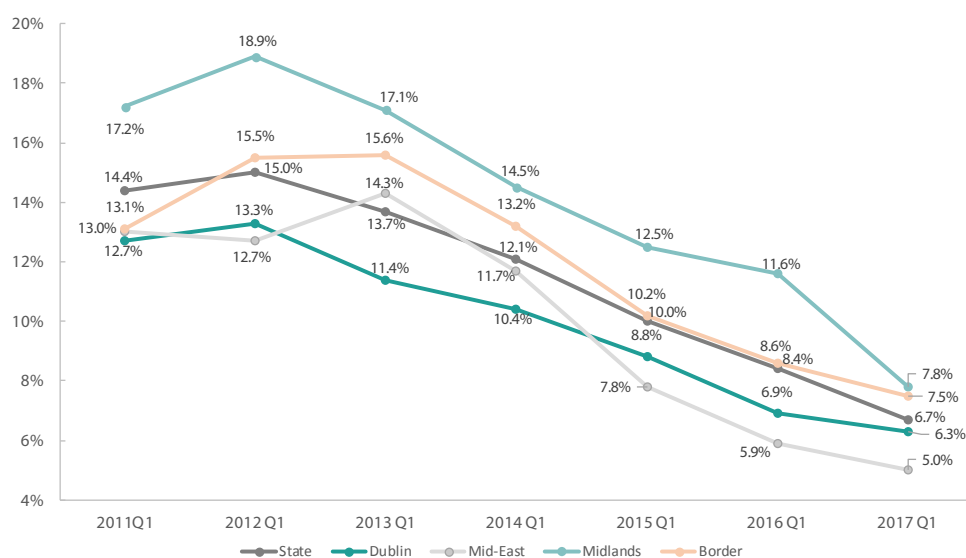
By Electoral Division (ED)



ILO Unemployment Rate, 2011-2017



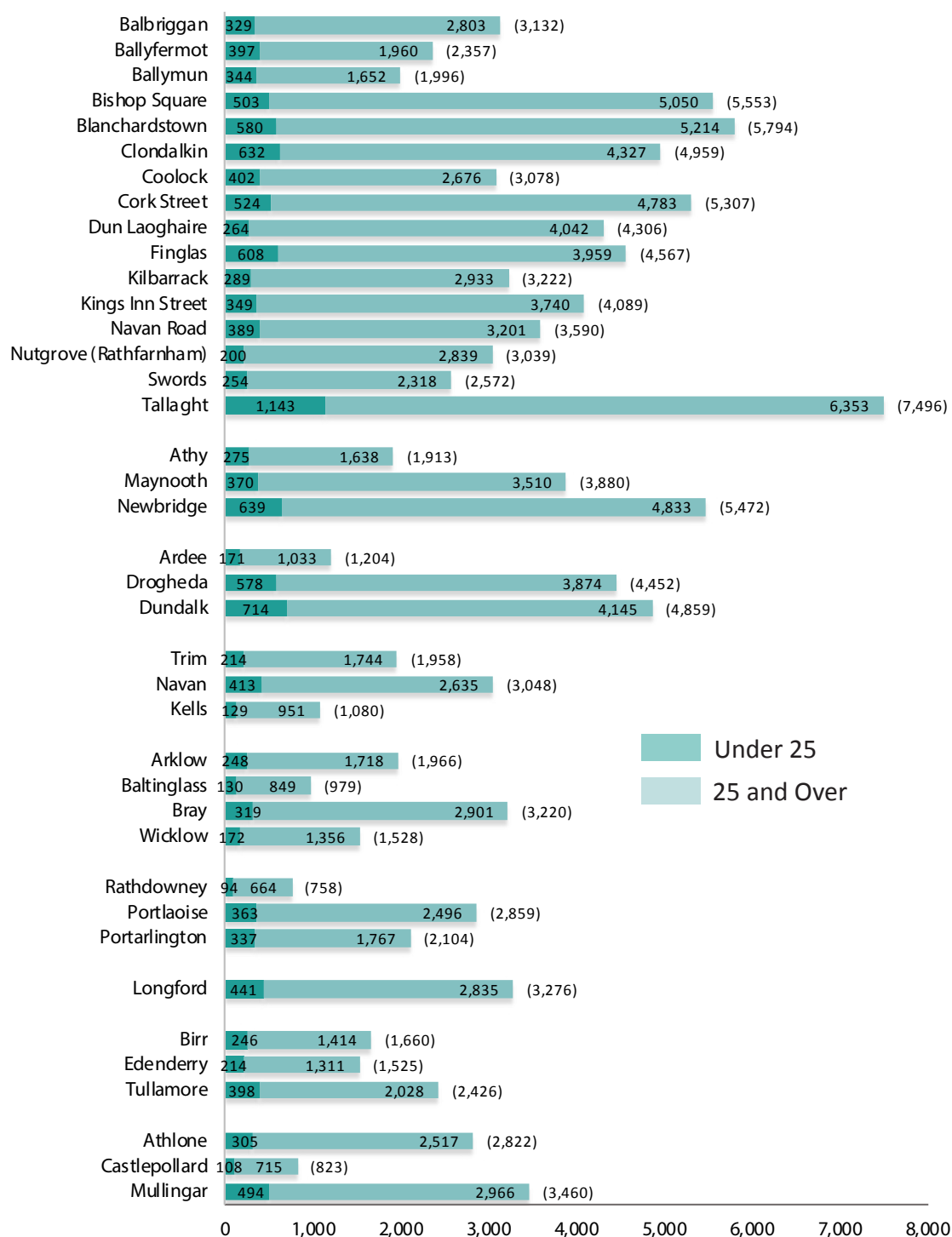
ILO Unemployment Rate, Q1 2017 (Source: CSO & AIRO)



ILO Unemployment Rate, 2011 to 2017 (Source: CSO & AIRO)

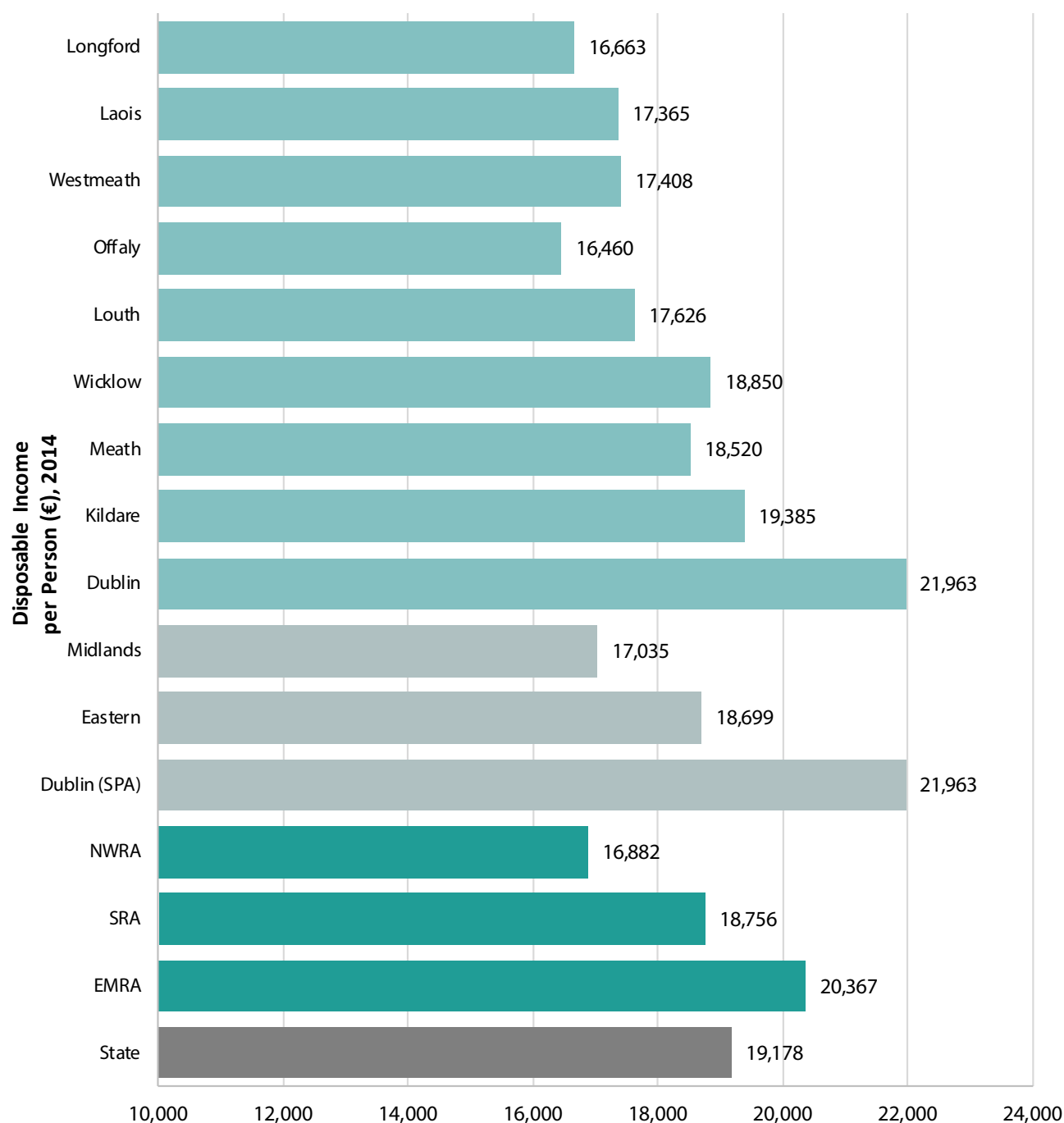
- Regional level unemployment data in Ireland is available using the International Labour Office (ILO) definition and is based on data collected in the Labour Force Survey, which is called the Quarterly National Household Survey (QNHS). According to Q1 2017 QNHS statistics, the latest unemployment rate for Ireland is 6.7% and is much lower than the comparative EU28 average of 8.3%. On a regional basis (existing NUTS III rather than SPA), highest rates within the EMRA area are in the Midlands (7.8%) and Dublin (6.3%) regions with the Mid-East recording the lowest at 5%.
- The bottom graphic details the changing rates of ILO Unemployment between Q1 2011 and Q1 2017. Rates have decreased dramatically since the heights of the economic recession in 2011 within an overall State decrease of 7.7 percentage points from a Q1 2011 rate of 14.4%. Between Q1 2011 and Q1 2017 the Dublin region has decreased from 12.7% to 6.4%, the Mid-East from 13% to 8% and the Midlands from 17.2% to 9.4%. The Border region, of which Louth is a part of, has decreased from 13.1% to 5.6%.

Live Register by Social Welfare Office, 2017 (M8)



An alternative method of analysing the spatial patterns of unemployment is to use the unadjusted Live Register at Social Welfare Office level. The Live Register is compiled from returns made by each local welfare office to the Department of Social Protection and passed on to the Central Statistics Office. The Live Register is not specifically designed to measure unemployment as it includes part-time (those who work up to three days a week), seasonal and casual workers entitled to Jobseekers Allowance or Jobseekers Benefit. It does, however, allow an analysis of employment trends at both a county level and also at social welfare office (SWO) level. Data is available for both Under 25 (Youth Unemployment) and 25 and Over.

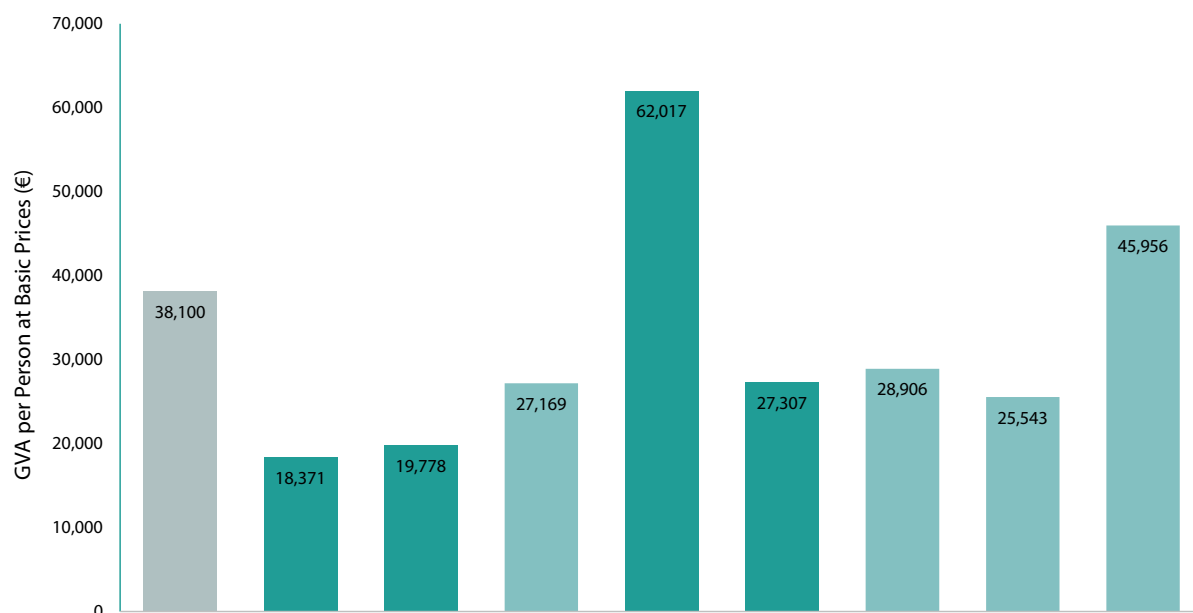
Disposable Income per Person (€), 2014



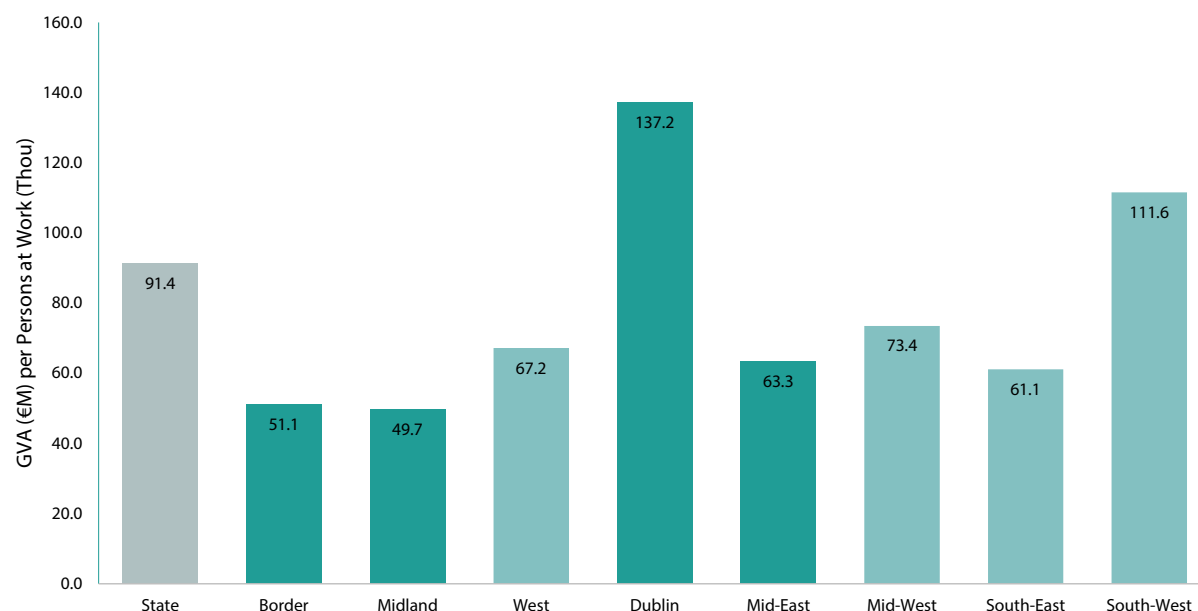
Disposable Income per Person (€), 2014 (Source: CSO & AIRO)

- Disposable Income per Person (€) is published by the CSO in their annual 'County Incomes and Regional GDP' publication. Disposable Income is calculated as follows: total income *minus* current taxes on income *minus* social insurance contributions. The latest data available from the CSO is from 2014.
- Of the three SPAs in EMRA, the Dublin SPA had the highest average disposable income per person in 2014. At €21,963 it was 14.5% higher than the State figure of €19,178 and approximately 5.5% higher than the figure of €20,834 (revised) for 2013. Both the Eastern and Midland SPA had much lower levels with the Midland recording the second lowest level of all SPAs and was marginally higher than the Border SPA at €16,755.
- While the county figures involve uncertainty they do provide a useful indication of the degree of variability at county level. On a national scale, the counties of Dublin, Limerick, Kildare and Cork are the only counties where per capita disposable income exceeded the state average in 2014. Within EMRA highest levels of disposable income are in Dublin, Kildare and Wicklow with the lowest in Longford and Offaly.

Gross Value Added (GVA) per Person, 2014



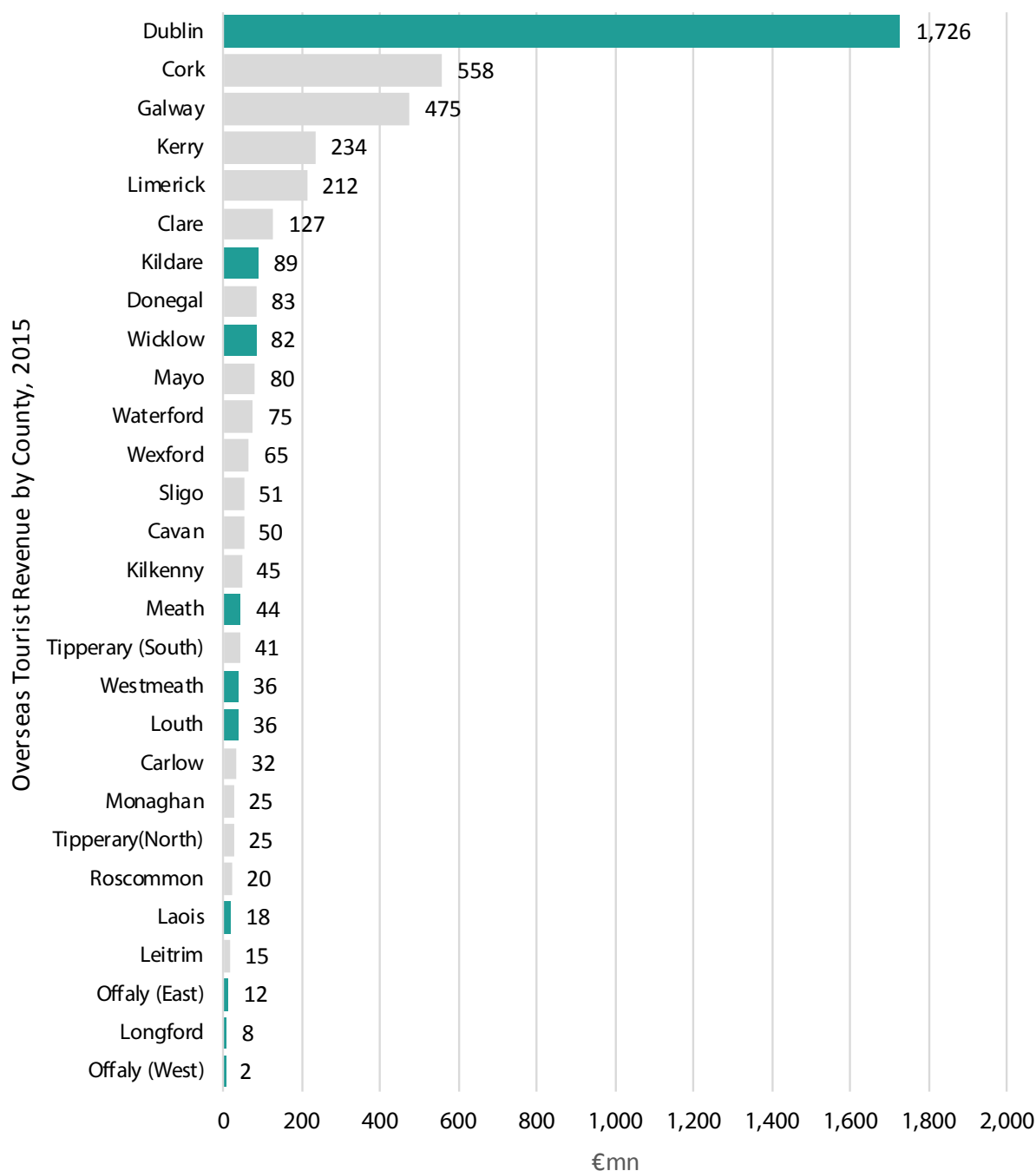
GVA per Person at Basic prices (€), 2014 (Source: CSO & AIRO)



GVA (€m) per Person at Work (Thou), 2014 (Source: CSO & AIRO)

- Gross Value Added (GVA) at basic prices is a measure of the value of the final goods and services produced in a region (less the materials and services used which come from outside the region) priced at the value which the producers received minus any taxes payable and plus any subsidies receivable as a consequence of their production or sale.
- The top graphic details GVA per Person at Basic Prices (€) across the eight NUTS III regions in Ireland. As expected Dublin has the highest GVA per person at €62k however it should be noted that inter-regional flows and high levels of commuting into Dublin from the Mid-East greatly exaggerate this figure. As such, it is more appropriate to refer to a combined Dublin/Mid-East GVA per person figure of €51,799. Lowest levels of GVA per person are recorded in both the Border (€18,371) and Midland (€19,778) regions.
- The bottom graphic details labour market productivity which is defined as GVA at basic prices per person employed. GVA per person at work is, as expected, highest in Dublin at €137.2m per person at work while in the Midland region it is €49.7m. The South West also shows a very high level of labour productivity. At €111.6m per person at work the South West is only slightly below that of Dublin and the Mid East combined (€116m).

Regional Tourism Profile, 2015



Regional Tourism Performance in 2015 (Failte Ireland, 2016)

- According to the Failte Ireland Regional Tourism Performance Report for 2015, a total of 12,779 ('000s) overseas tourists visited Ireland in 2015. Of these, 5,859 (47.7%) were estimated to be visiting either Dublin or the East & Midlands tourism region (Kildare, Longford, Meath, Offaly, Laois, Louth, Wicklow or Westmeath). The total revenue generated from overseas tourists in 2015 was estimated to be €1,762m and approximately 48% was estimated to be generated within the two EMRA regions. Dublin is by far the most important overseas tourism destination in the country and accounts for more than double the number of its nearest rival - the South-West.
- The top graphic details the breakdown of estimated overseas tourism revenue generated per county in 2015. As highlighted, Dublin accounts for more than 40% of the national revenue generated. Kildare, Wicklow and Meath are the next most important tourist destinations within EMRA with much lower levels of income generated in Laois, Longford and Offaly.